DOCUMENT RESUME

ED 149 417 EA 010 194

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|---|---|
| TITLE | Standards for Intermediate Education Districts. (Education Service Districts on 1 July 1978.) |
| INSTITUTION | Oregon State Dept. of Education, Salem. |
| PUB DATE | 77 |
| NOTE | 17p.; Not available in paper copy due to small type size of much of the original document |
| EDRS PRICE | MF-$0.83 Plus Postage. HC Not Available from EDRS. |
| DESCRIPTORS | Elementary Secondary Education; *Evaluation Criteria; Guidelines; *Intermediate Administrative Units; Program Evaluation; *State Standards |
| IDENTIFIERS | *Oregon |

ABSTRACT

This booklet presents the Oregon State Standards for Intermediate Education Districts, which were adopted by the State Board of Education in August 1977 and will take effect in July 1978. The booklet is intended to guide the state's standardization teams in their periodic onsite evaluations of individual intermediate education districts (IEDs) and to aid IED personnel in preparing for such evaluations. After a brief discussion of the overall plan for implementing the new IED standards, the text of each section of the standards is presented, followed by a checklist of questions to consider in determining whether an IED has met the requirements of that section. (JG)

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# STANDARDS

for

# INTERMEDIATE EDUCATION DISTRICTS

(Education Service Districts on 1 July 1978)

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EA 010 194

## STATEMENT OF ASSURANCE

**Oregon Department of Education**

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## FOREWORD

The State Board of Education in August 1977 adopted standards for intermediate education districts, the first such standards authorized by section 3, chapter 477, *Oregon Laws 1975* (now ORS 334.217).

An appointed ad hoc task force prepared various drafts. Task force members were

*IED Board Members*
Mr. Jim Dimick, Clatsop

*IED Superintendents*
Mr. Buck Eddy, Baker
Mr. Charles Seger, Linn-Benton
Mr. Tom Sommerville, Multnomah
Mr. Ken Stanhope, Umatilla

*IED Staff*
Ms. Betty Parrett, Linn-Benton
Dr. Betty Ellis Fish, Union
(now with the Oregon Department of Education)

*Oregon Department of Education Staff*
Dr. Don Kipp
Dr. Clarence Mellbye

Dr. George Martin, Oregon Department of Education Volunteer, was the chief writer.

Drafts were distributed to all intermediate education districts, numerous interested persons reviewed them, and hearings were conducted. During the 1976-77 school year, a draft was field tested in six pilot districts: Columbia, Douglas, Grant, Harney, Linn-Benton and Wasco. As a result of these tests, the standards and implementation instruments were revised.

The school year 1977-78 will be the first for standardization of intermediate education districts under the new standards. In July 1978 intermediate education districts will become education service districts (chapter 481, *Oregon Laws 1977*).

Verne A. Duncan
State Superintendent of
Public Instruction

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# STANDARDS
for
# INTERMEDIATE EDUCATION DISTRICTS
**(Education Service Districts on 1 July 1978)**
*(Adopted 12 August 1977)*

## Implementing Standards

Under authority of OAR 581-24-210, the School Standardization Section of the Oregon Department of Education standardizes intermediate education districts (IEDs)--education service districts (ESDs) on 1 July 1978. This publication may help not only standardization teams but also IEDs as they prepare for standardization visits.

All IEDs regularly carry on required and optional activities and collect data relating to such activities. These standards apply to the regular responsibilities and work of an IED. Other responsibilities and work may be based on statutory requirements and may require annual reports to the Department of Education.

A standardization visit will be made at least once in every five years. The district or the Department of Education may request special visits, usually for review of specific portions of the standards.

IED staff will provide information required of them in at least these ways:

They will submit a self-appraisal to the standardization team leader at least two weeks before the first day of the scheduled visit. This report should state ways the IED believes it meets the standards and should be based on the "Standardization Instrument" in this publication.

They will provide easy access to documents and files referred to in these standards.

They will be available during the visit for discussion with members of the standardization team.

They will provide access to IED staff housed at constituents, administrative personnel at constituents, and other persons the district superintendent and the team leader think can provide information about IED services.

School Standardization Section staff will:

*emphasize* ways to help the IED.

*have* the standardization team leader consult with the district superintendent before and during the visit to determine the best ways to meet these standards.

*submit* to the district superintendent for review an unofficial draft of the team report before it is written in official form.

A member of the School Standardization Section will organize the standardization team. The number of team members will vary with the size of district and services it offers. Members will be selected in consultation with the district superintendent and may include Department personnel, members of other IED staffs and nonconstituent staffs.

The standardization visit will be conducted at a time mutually acceptable to the IED and the Department. The unofficial report of the visit will be sent to the district superintendent as soon as possible—but not later than *sixty* days—after the visit. The district superintendent will have opportunity to comment on the report before the official report is written. The official report will be sent to the IED not later than *ninety* days *after the visit* (not later than 30 after the first 60).

## Standardization Instrument

Districts should use this instrument when preparing their self-appraisals. Standardization team members should use it when visiting districts. Both district staff and team members should use the form "Standardization Checklist" for their responses.

The standards the Board adopted on 12 August 1977 follow in small type. After each standard is information for preparing the "Standardization Checklist." Checklist items are what team members will look for, *even though some items may* **SEEM** *not to be required under a rule.* Equitable judgment is the aim. No surprises is the method.

*Definitions*

**Definitions**

**581-24-205** The following definitions apply to Oregon Administrative Rules 581-24-205 through 581-24-280 unless otherwise indicated by context:

(1) "Assessment": activities designed to secure and organize information describing district performance relative to its own instructional and support program goals;

(2) "Board". State Board of Education;

(3) "Conditionally Standard District": a district having failed to meet provisions of Division 24 of Board administrative rules but for which the district board has adopted and submitted a plan subsequently approved by the Board for correcting deficiencies;

(4) "Constituent": a school district whose administrative office is within the district;

(5) "Department": Oregon Department of Education;

(6) "District": through June 30, 1978, an intermediate education district; on July 1, 1978, an education service district;

(7) "District Board": through June 30, 1978, an intermediate education district board; on July 1, 1978, an education service district board;

(8) "Nonconstituent": a school district whose administrative office is outside the district;

(9) "Program Goals" (Instructional): statements of desired learner outcomes for each district instructional program in any combination of grades kindergarten through 12;

(10) "Program Goals" (Support): outcomes of district programs to support the entire system or one or more of its components, usually stated in terms of service to be performed;

(11) "Program Improvement": using assessment and needs identification information in making program revisions that reduce needs identified;

(12) "Program Needs Identification": procedures to specify and rank actual and desired outcomes of district programs sufficient to warrant considering program revision;

(13) "Standard District": a district having met provisions of Division 24 of Board administrative rules;

(14) "Substandard District": a district having failed to meet provisions of Division 24 of Board administrative rules and within ninety days of the Board's notification of deficiencies not having submitted a correction plan or adhered to the correction plan the Board received and approved;

(15) "Superintendent": State Superintendent of Public Instruction.

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**Administration of the Standardization Program**

**581-24-210** (1) Each district must comply with Division 24 of Board administrative rules. These standards emphasize the district's responsibility to help provide a uniform and general system of common schools in Oregon.

(2) The Superintendent initiates standardization visits to districts on a regularly scheduled basis and at other times as necessary. A district desiring an official standardization visit at other than scheduled times shall present a written request to the Superintendent. The district will be classified after an official standardization visit.

I Has the district complied with each rule in these standards?

**Assignment of Standardization Classification**

**581-24-215** (1) An official standardization classification shall be assigned to each district within ninety (90) calendar days after Department personnel supervise an on-site visit.

(2) The classifications shall be:

(a) Standard district;

(b) Substandard district;

(c) Conditionally standard district.

(3) A district classified standard performs all duties statutorily prescribed for districts.

(4) A district classified substandard shall submit a district board-adopted correction plan to the Board. The plan shall contain specific steps to correct each deficiency, completion dates for correction and the district board-adoption date. When the Board approves the plan, the district shall be classified conditionally standard.

(5) Failure of a conditionally standard district to meet the terms of its correction plan will cause the district to revert to substandard classification until the district adheres to its plan or until the Board approves an amended plan.

(6) When district officials certify that a conditionally standard district has completed its correction plan, the Board may change the classification to standard.

(7) The Board may merge a substandard district with a contiguous standard district if, after the district has been provided substantial counsel but has made unsatisfactory progress toward meeting its correction plan or cannot find acceptable alternatives, the merger will better meet the needs of constituents and nonconstituents.

I Has the district (to be classified standard) documented having performed these duties:

A *Registration of teaching certificates and contracts* (see ORS 342.173 and 342.601)?

1 Certificates, with endorsements, and contracts regularly filed for all certificated staff?

2 Such records obtained for all such district and constituent employees?

3 Withheld funds—if necessary—as required in ORS 342.173?

4 Helping constituent staff to become certificated?

B *Public Meetings (and Minutes)* (see ORS 192.610-192.680; 192.710)?

C *Public Records and Reports* (see ORS 192.005-192.170; 192.210; 192.310)?

D *Inspection of Public Records* (see ORS 192.410-192.500)?

E *Intergovernmental Cooperation* (see ORS 190.003-190.110)?

F *Holidays* (see ORS 187.010-187.110)?

G *Hours of Labor, Wages* (see ORS 652.110-652.250; 652.310-652.320; 652.610-652.620; 652.710-652.720)?

H *Legal Notices* (see ORS 193)?

I *Teachers and Other School Personnel*
*Employment* (see ORS 342.505-342.553)?
*Terms and Conditions* (see ORS 342.595-342.663)?
*Fair Dismissal* (see ORS 342.805-342.930)?
*Miscellaneous* (see ORS 342.955-342.980)?
*Conditions of Employment* (see ORS 653.010; 653.015; 653.025; 653.040-653.060; 653.261; 653.305-653.326; 653.340)?
*Civil Rights* (see ORS 659)?

J *Safety and Health* (see ORS 654)?

K *Unemployment Insurance* (see ORS 657)?

L *Public Employes' Retirement System* (see ORS 237)?

M *Local Financing of Education* (see ORS 328.005-328.035; 328.441-328.470)?

N *Public Contracts* (see ORS 279.011-279.575)?

and these duties, IF A RESPONSIBILITY OF THE DISTRICT:

O *Conduct of Schools Generally* (see ORS 336.010; 336.015-336.082; 336.125-336.155; 336.185-336.215)?

P *Textbooks* (see ORS 337)?

Q *Transportation* (see ORS 338; 485.010-485.060)?

R *Educational TV* (see ORS 354.410-354.440)?

S *Career and Vocational Education* (see ORS 344.070-344.100; 344.120-344.140)?

T *Benefits to Injured Trainees* (see ORS 655)?

II Are prior classification reports filed in the district office?

III If district last classified substandard, do files contain correction plan (submitted within 90 days after classification assigned), response from the Board and other communications relating to the plan?

IV If a correction plan was submitted and approved, do district documents show status of efforts to meet agreements specified in the plan?

**Waiver Provisions**

**581-24-220** (1) The Department will encourage districts to develop carefully planned pilot or experimental programs, and the Department will give latitude to districts to deviate from these standards for this purpose. When such a program requires deviation from these standards, the district shall submit a petition describing its proposed program to the Superintendent and secure Board approval prior to implementing the change. Approval, if granted, shall be for a specified time and may be followed by Department evaluation of the program.

(2) When a district believes it is not feasible to comply with a specific standard, it may petition the Board for a waiver.

(3) The petition for waiver shall:

(a) Identify the specific standard for which the waiver is requested;

(b) Specify why the district cannot reasonably comply with the standard;

(c) Specify how the district's proposed alternative will provide the services or facilities required;

(d) Identify a maximum time for which the waiver is requested.

(4) The Superintendent shall recommend to the Board approval of waivers when the district superintendent provides satisfactory assurance that planned programs meet the intent of standards and district needs. The district board shall adopt all petitions for waivers.

(5) Petitions for waivers modifying requirements specified in the "Oregon Revised Statutes" shall not be approved.

I If initiated, is a Board-approved petition for waiver on file?

II If requested and approved, are the alternatives providing the services or facilities required?

*Instructional and Support Programs*

**Program Planning and Assessment**

**581-24-225** Each district board shall adopt and implement a system of program planning and assessment to provide for:

(1) District board-adopted goals including:

(a) Instructional program goals, to the extent the district conducts such instructional programs;

(b) Support program goals the district and its constituents develop together.

(2) Assessing progress toward district goals and reporting results to the district board and, as appropriate, to the district's constituents.

(3) Identifying instructional and support program needs and determining priorities for addressing them. This process shall involve the constituents in determining at least the support program needs.

(4) Policies and procedures for making improvements in instructional and support programs. These policies and procedures shall aim at reducing identified needs having highest priority in the district.

(5) A report of current status and proposed revisions to the district board for its approval, and to the Department School Standardization Section.

I Has the district:

A Developed appropriate instructional and support goals?

B Assessed progress toward district goals and reported results in district board minutes and to constituents?

C Identified instructional and support program needs and determined priorities for addressing them, indicating the type and degree of constituent participation?

D Provided policies and procedures for making improvements in instructional and support programs, indicating how all unmet needs have been reduced in priority order?

II Has the district documented how well it has carried out these activities?

III Has the district provided *annually* to the School Standardization Section a written report showing the district assessment plan, needs identification procedure, schedule for making improvements, and record of presentation to and action by the district board?

IV Has the district superintendent provided to the team leader supplementary information with a description of processes used and input from district and constituent staff?

*Instructional Services*

**Instructional Services**

**581-24-230** (1) Each district or combination of districts with constituents shall provide by contract or resolution instructional services including but not limited to:

(a) A consultant for each program provided;

(b) Assistance for constituents to gather, analyze and appropriately report group tests and measurement data relating to student progress;

(c) In-service activities with or for constituents;

(d) An instructional media center for district and constituent staffs.

(2) Each district or combination of districts with constituents shall maintain:

(a) Plans and procedures for designing and implementing services provided;

(b) A process for assessing the services;

(c) Evidence that the services provided by contract or resolution have been developed and approved by the district or combination of districts with constituents and reported to the Superintendent.

(3) Contract services require:

(a) To constituents, evidence of unmet needs, plans and procedures to meet those needs and a process for assessment;

(b) To nonconstituents, evidence that these services do not reduce other services the district provides its constituents.

I Do district records outline instructional services provided constituents, and show:

A Processes used to identify needs, develop services and provide for their implementation?

B Assignment of staff member(s) responsible for each service?

C Use of appropriate procedures for helping constituents gather, analyze and report *group* test and measurement data on student progress?

D Implementation of in-service activities with or for constituents?

E Establishment of, or an appropriate record of contracts with constituents for the establishment and use of, an instructional media center for district and constituent personnel?

F A process for assessing these services?

II Do district files contain all past and current contracts with, and resolutions from, constituents?

III Do district records of services provided constituents in response to resolutions document needs and include:

A Written plans and procedures for designing and implementing the services?

B A process for assessing these services?

C District board approval and reporting to the Superintendent?

IV Do district records showing services provided constituents and nonconstituents include:

A Duration of contracts as found in the agreements and official actions?

B *For constituents,* evidence services have been developed in cooperation with constituents, evidence of one or more unmet needs, and evidence of written plans and procedures developed to meet those needs with a process for assessing these services?

C *For nonconstituents,* evidence services do not reduce other services already provided constituents?

D District board approval and reporting to the Superintendent?

**Special Education Programs**

**581-24-235** Each district shall cooperate with its constituents to:

(1) Identify resident exceptional children;

(2) Develop and implement services to meet unmet needs of these identified children as mutually agreed;

(3) Assist constituents to gather, analyze and report individualized testing data;

(4) Develop and implement plans for assessing these services.

I Has the district, cooperatively with constituents as appropriate, devised and used ways to determine the needs for all exceptional children* residing in the district in keeping with the intent of ORS 343.045?

II Has the district helped constituents develop services and the necessary implementation procedures to meet the unmet needs of these exceptional children?

III Has the district developed and used appropriate procedures for assisting constituents to gather, analyze and report appropriately *individualized* testing data?

IV Has the district developed and implemented plans for assessing these services, including the use of performance indicators?

V Have district superintendents and other personnel provided, as requested, information about these programs and other district special education needs?

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*Exceptional children includes both the handicapped and the educationally able and gifted.

**Administration**

**581-24-240** (1) Each district board shall adopt rules, policies and procedures pursuant to ORS 334.125(7), and shall make such information available upon request.

(2) Each district shall complete and forward promptly all reports agencies of state and federal governments require.

(3) Each district shall cause all employees responsible for funds, fees or cash collections to be covered under a district board-approved bond.

I Are copies of district board-adopted rules, policies and procedures:

A Available?

B Consistent with statutes and Board rules?

C Reviewed regularly?

II Are:

A Board minutes in order?

B Meetings properly called?

C Appropriate actions noted on statutory matters?

D Executive meeting records properly maintained?

III Has the district announced and made available to staff and the public copies of its rules and policies?

IV Do district records show prompt forwarding of all reports state and federal agencies require?

V Do district records show board action to require certain staff to hold an approved bond and contain a file with a copy of each bond?

**Staff**

**581-24-245** (1) Each district shall employ staff as needed to accomplish the goals of the district, as adopted by the district board and provided for in its annual budget.

(2) Each district shall assign:

(a) Certificated personnel in accordance with certification rules;

(b) All personnel in accordance with their position descriptions.

(3) Each district shall maintain personnel policies to include:

(a) An affirmative action plan assuring equal employment opportunities for all persons regardless of age, handicap, national origin, race, marital status, religion or sex;

(b) Liaison between the district board and its employees, described by means of a chart or written statement.

(4) Personnel policies shall be provided to all employees and made available to the public.

I Has the district properly employed a superintendent as shown by:

A Board minutes?

B Copy of the contract between the superintendent and district?

C A file copy of the proper certificate?

II Do district records include acts of the district board as properly recorded in official minutes, and show:

A Employment of district staff?

B Assignment of district staff?

C Retention of district staff?

III Is a file maintained for certificates and contracts between the district and staff showing certificated employees assigned in accordance with TSPC rules (see page 3, I-A)?

IV Do district records show the development, acceptance and proper maintenance of position descriptions for all district employees?

V Has the district an up-to-date document showing all district personnel policies, including:

A An affirmative action policy?

B A district plan for achieving equal employment opportunities?

C A liaison system between district board and employees—as shown by a chart or descriptive statement and reviewed with IED staff?

D Evidence all staff members have been informed of the availability of the personnel policies?

VI Are written collective bargaining procedures, if used (see ORS 243.650-243.830), and a copy of current agreement(s) available for inspection?

**District Boundary Board**

**581-24-250** In fulfilling its statutory responsibility to serve as district boundary board, the district board shall:

(1) Maintain official minutes showing its actions as district boundary board since the last standardization visit;

(2) Insure that meetings and minutes of the district boundary board are separate from its actions as district board;

(3) Maintain current legal descriptions and maps showing the boundaries of constituents and appropriate nonconstituents.

I As shown in the proper minutes, has the district board conducted separate meetings when acting as the boundary board?

II Are all minutes maintained as a separate record of boundary board actions?

III Are current legal descriptions and maps showing the boundaries maintained in the district office?

**Attendance Supervision**

**581-24-255** Each district shall provide attendance supervision services for constituents of less than 1,000 ADM.

I Do district records and position descriptions show the assignment and duties of an attendance officer to serve constituents of less than 1,000 ADM (see ORS 339.010-339.090)?

II Do district records summarize the type and frequency of specific services the attendance officer provides?

**Budgets**

**581-24-260** Each district board shall:

(1) Assist constituents when needed to develop annual budgets;

(2) Maintain a file of district and constituent budgets as finally adopted.

I Does the district maintain up-to-date files showing:

A The process through which the district annual budget is developed?

B The involvement of the district budget committee?

C The legal process for submitting the budget to vote and for conducting the election, if held,

D Copies of the annual budget?

II Can the district demonstrate the use of:

A The annual budget?

B The financial controls developed and administered for the fiscal management of district services?

III Has the district certified to the Superintendent on or before May 15 the levy for support of constituents (see section 12, chapter 840, *Oregon Laws 1977*—EFFECTIVE 15 MAY 1978 FOR THE 78-79 SCHOOL YEAR)?

IV Has the district up-to-date files containing copies of the certification of the annual levy to the county assessor by July 15, or written approval for a delay?

V Has the district up-to-date files containing copies of the offset apportionment submitted to the county assessor annually, as appropriate?

VI Has the district up-to-date files containing copies of past and current resolutions, if any?

VII Can the district demonstrate ways it has helped constituents develop and administer their local budgets, and ways constituents have conducted their fiscal affairs in a prudent and legal manner?

VIII Has the district up-to-date files containing both district and constituent annual budgets?

**Audits**

**581-24-265** Each district shall insure that an annual audit of constituent accounts is conducted and shall:

(1) File in the district office a copy of these annual audits;

(2) Assist constituents to meet requirements of state agencies.

I Has the district up-to-date files containing copies of past and annual audits (including the latest) for each constituent?

II Has the district informed constituents who fail to file annual audits?

III Has the district evidence of helping constituents meet the requirements of various state agencies in conducting audits?

**State Board Assistance**

**581-24-270** (1) Each district shall assist the Department in providing state-level services and support of statutes and standards.

(2) Services the district provides for the Department shall be documented in agreements.

(3) Each district shall document how it has assisted constituents to comply w[illegible] statutes and rules applicable to their operation.

(4) Each district s[illegible] gather and forward information the Department requires or requests.

(5) Each district shall, within its capabilities and when requested, provide personnel to assist in Department standardization visits.

I Has the district evidence of written communications with the Board (Department) about, and the related plans and procedures for providing, state-level services in the district and its constituents?

II Do district files contain past and current written agreements (contracts) showing the services the district provides in cooperation with the Board?

III Do district files show how the district has cooperated and worked with constituents to help them comply with statues and rules for the operation of constituent districts?

IV Do district records indicate ways the district has satisfactorily gathered and reported information the Department has requested?

V Do district files show ways the district has provided personnel and other assistance as requested to the Department for standardization visits, including the names and assignment of such personnel?

VI Does the district regularly file reports other agencies require of them?

**Facilities and Safety and Emergency Planning**

**581-24-275** (1) Each district shall operate an adequate central office and such other physical facilities as may be needed to meet district goals and statutory requirements.

(2) Each district shall maintain inspection reports showing the district in compliance with health and safety regulations.

(3) Each district shall conduct and document regularly scheduled safety inspections of all facilities and properties under its direct jurisdiction.

(4) Each district shall post an emergency medical plan for obtaining first aid, ambulance, hospital and physician services.

(5) First-aid supplies and qualified first-aid personnel shall be available at district facilities.

I Has the district a description of all buildings and other physical facilities used to conduct services in the district, indicating the activities carried on in each facility?

II Has the district posted an emergency medical plan for obtaining first aid, ambulance, hospital and physician services?

III Do district records show regularly conducted safety inspections and drills at all facilities and properties under the district direct supervision?

IV Do records show, and does inspection reveal, first-aid supplies and qualified first-aid personnel available at district facilities?

V Do documents show the district plan and procedures for helping staff develop and follow good health and safety practices?

VI Do district records show a staff organization for developing and maintaining good health and safety practices and procedures?

VII Are requirements and recommendations of the State Department of Labor being observed?

A Safety meetings held?

B Staff assigned as safety "officers"?

C Staff functioning as safety "officers"?

**Auxiliary Services**

**581-24-280** Each district choosing to engage in auxiliary services with constituents or other agencies shall do so consistent with district goals and shall document planning and assessment procedures for each such service.

I Do district records show for all other services the district provides not already covered under these standards:

A A statement of unmet needs, and how they were determined?

B The written programs and procedures for such services, including assessment?

II Have constituent superintendents, as identified by the IED superintendent and team leader, been asked to suggest any additional auxiliary needs the IED might serve?